

August 27, 2002

TO: Dottie Kingsley  
FROM: Howard W. Bell, Jr.  
RE: Best Practices Update Report

The following is an update of progress on Track 2 of the Pell-IRS study. More specifically during the past month the following has been accomplished:

- 1) Have contacted a number of the persons previously interviewed as part of the best practices research project to receive clarification on the information that they provided during the initial interview. More specifically:
  - a) Contacted all but one of the interviewed schools and received written feedback from five of them.
  - b) Spoke with Sherry Fox of the New Jersey Higher Education Student Assistance Authority for clarification on the handling of applicant asset information.
  - c) Spoke with Mary Beth Kelly of the Pennsylvania Higher Education Assistance Agency for clarification of the major reviews conducted by the Division for the State Grant Program.
  - d) Met with Al Hyde to receive clarification of the best practice principles that he set forth during his initial telephone interview.
- 2) Worked with Amanda Wingo to:
  - a) Develop the agendas used at the 8/6/02 and 8/20/02 Bi-Weekly Pell Team meetings.
  - b) Modify the multi-year multi-project planning document.
  - c) Update the plans for the best practices Focus groups and symposium meeting.
- 3) Developed a final draft of the Best Practices Report.
- 4) Developed an initial draft of a proposed set of projects for reducing overawards to be pursued during the next two years based on the best practices research.